

# Payroll User Group Meeting

---

Wednesday March 11, 2009

9:30 A.M. – 12:30 P.M.



# **Welcome**

Kevin McHugh – Payroll Bureau Director

# Massachusetts State Employee Credit Union

Ed Connors



# Year End 2008 Metrics

- W2s printed **96,808** (vs **94,907** in '07)
- Check Reversals **1,386** (vs. **1,338**)
- Tax Balance Adjustments **3,096** (vs. **3,111** )
- \$ Federal tax withholdings **\$502M** (\$ **485M**)
- \$ Medicare taxes paid **\$52.1M** (\$ **43.7M**)

# Year End 2008

---

What additional tools do you want/need? (IE. Queries, Reports, Notices, etc.)

Do you have suggestions for improving the Year End Process, balances and W2's?



# THE AMERICAN RECOVERY AND REINVESTMENT ACT OF 2009

Provisions Impacting Payroll for the  
Commonwealth

## “Making Work Pay” Tax Credit

- For tax years 2009 & 2010 this provision allows for a refundable 6.2% tax credit for earned income up to a max of \$400 (Single) and \$800 (Married)
- Increase to your net pay through revised Withholding tables see: <http://www.irs.gov/pub/irs-pdf/n1036.pdf>
- No new W4 needed – (higher tax brackets had no change)
- Beware of Adjusted Gross Income if Single earning >\$75K or Married >\$150K – may not have sufficient Withholdings taken

# Earned Income Tax Credit

- Temporary Increase to Earned Income Tax Credit
  - Current Law - Working families with 2+ children qualify for an EI tax credit = to 40% of the family's 1st \$12,570 of EI
  - Revised Law - Working families with 3+ children qualify for an EI tax credit = 45% of the family's first \$12,570 of EI



# Increase in Commuter Transportation Benefit

- Effective March 2009: The Excludable Benefit for Commuter Highway Vehicle Transportation and Transit passes Increased to **\$230** from \$120 in 2008
  - @1600 employees to save @ \$17 a month in taxes
- The exclusion for Qualified Parking remains the same for 2009 at \$230

# Sources

- FULL SUMMARY OF PROVISIONS FROM SENATE FINANCE, HOUSE WAYS & MEANS COMMITTEES

<http://finance.senate.gov/press/Bpress/2009press/prb021209.pdf>

- IRS Publication 15-T (Rev. March 2009) <http://www.irs.gov/pub/irs-pdf/p15t.pdf>

- IRS Publication 15-B For Use in 2009

<http://www.irs.gov/pub/irs-pdf/p15b.pdf>



# Health Care Connector

Cheryl Ierna

# Open Enrollment

- Notices to Employees @ March 27
- Website Updated for shopping for coverage May 1st – 29th for July 1st or August 1st effective dates
- New for this year – Health Care Alternative for Employees Leaving State Service (COBRA)

# OPEN ENROLLMENT

May 1<sup>st</sup> – 29<sup>th</sup> for July 1<sup>st</sup> or August 1<sup>st</sup> effective dates\*

Health Insurance for Non-GIC Eligible  
Commonwealth Employees



**Commonwealth Choice**  
Your Connection to Good Health



If you are not eligible to receive state-subsidized health insurance through the Group Insurance Commission (GIC), you can purchase health insurance on a pre-tax basis from the state's Health Connector Commonwealth Choice programs. Commonwealth Choice offers a broad selection of brand-name health plans. All have earned the Health Connector's Seal of Approval for affordability and quality.

\*For more information about eligibility, enrollment and effective dates of coverage, visit the GIC website at [mass.gov/gic/](http://mass.gov/gic/).

## To learn more about Commonwealth Choice options -

- 1 Go to [MAhealthconnector.org](http://MAhealthconnector.org) or call 1-877-MA-ENROLL (1-877-623-6765)
- 2 Click on the "Employees" picture. You will be prompted for an Employer Identification Number – the Commonwealth of MA Employer ID# is 149683.
- 3 Compare benefits, prices and enroll
- 4 Once you enroll, the Commonwealth will begin making pre-tax deductions from your bi-weekly paycheck



Harvard Pilgrim  
Health Care



Remember...  
Most Massachusetts  
residents age 18  
or older must have  
health insurance or  
pay a significant tax  
penalty.

**Neighborhood Health Plan**  
*Getting better together.*

**TUFTS Health Plan**  
*No one does more to keep you healthy.*

To learn more...Go to [www.MAhealthconnector.org](http://www.MAhealthconnector.org).  
Or call 1-877-MA-Enroll (1-877-623-6765) Monday-Friday 8am to 6pm.  
The TTY for hearing or speech-impaired callers is 888-213-2763.  
All calls are free and private. We offer services for non-English-speaking callers.

# HEALTH INSURANCE ALTERNATIVE



For Massachusetts Residents Leaving State Service

**Commonwealth Choice**  
Your Connection to Good Health



Are you a Massachusetts resident leaving state service? Even if you are eligible to continue your GIC health insurance coverage through the state's 39 week layoff coverage and/or COBRA, the state's Health Connector has other health insurance options that may be a **better fit** for your needs and budget. Commonwealth Choice offers a broad selection of brand-name health plans. All have earned the Health Connector's **Seal of Approval** for affordability and quality. And unlike COBRA coverage, you can keep Commonwealth Choice for as long as you need it.

## GET STARTED

- 1 Go to [MAhealthconnector.org](http://MAhealthconnector.org) or call 1-877-MA-ENROLL (1-877-623-6765) to learn about your Commonwealth Choice options.
- 2 Compare benefits and prices.
- 3 Choose the plan that is right for you.

## YOU HAVE OPTIONS

Your Commonwealth Choice premium could be **lower** than your COBRA, layoff or conversion coverage. Depending on which plan you choose, your age and location, **Commonwealth Choice could save you hundreds and possibly thousands of dollars a year.** For example, for a 40 year-old living in Boston the monthly cost of a comprehensive Commonwealth Choice plan could be approximately 35% to 70% (single coverage) and 20% to 65% (family coverage) lower than COBRA.

CHOOSE FROM:



MASSACHUSETTS



Harvard Pilgrim  
Health Care



Remember...  
Most Massachusetts  
residents age 18  
or older must have  
health insurance or  
pay a significant tax  
penalty.

Neighborhood Health Plan  
*Getting better together.*

TUFTS Health Plan  
*No one does more to keep you healthy.*

To learn more...Go to [www.MAhealthconnector.org](http://www.MAhealthconnector.org).  
Or call 1-877-MA-Enroll (1-877-623-6765) Monday-Friday 8am to 6pm.  
The TTY for hearing or speech-impaired callers is 888-213-2763.

# Connector Deductions

- CCAHI is scheduled for all pay periods except 1/17/09 (last time), 8/15/09, and 1/22/10.
- The *skip* period is the period before the assigned HRCMS '3<sup>rd</sup> pay period'.

# GIC Update

- GIC annual enrollment dates are April 13-May 15 for changes effective July 1, 2009.
- April 7-April 14 Seven Coordinator training sessions at the beginning of April and will discuss important changes and procedures for annual enrollment
- Remember to RSVP to the GIC!



# 2009 HIRD Information

---

- Continue collecting HIRD forms.
- Report **MBEN021R**: Departmental HIBO
- How useful is this Report / Process?



# HR/CMS Upgrade and Beyond

Paul Dietl, Chief Human Resource Officer

Martin Benison, Comptroller

Richard Divosevic, Program Manager

# HR/CMS Upgrade

---

- Goals and Vision
- Team
- Timeline
- Highlights of Future Functionality
- Department Input

# Mission Statement

- ***Project Mission Statement***

Upgrade HR/CMS from release v8.0 SP1 to release v9.0 MP5 within fiscal 2010 with little to no disruptions to business operations. Employ efficient and expedient measures to keep the project on schedule and minimize customization to the v9.0 delivered product to deliver the foundation for additional new PeopleSoft functionality in the future.

# *Business Drivers*

- PeopleSoft Upgrade is needed to maintain a supported version of the software as well as potentially take advantage of newer and expanded functionality and enhancements
- The Commonwealth needs to minimize the total cost of ownership and maximize its ability to take advantage of new functionality in future releases. A key component of this strategy is products including the overall cost of future upgrades so they can be supported in the annual operating budget
- Improve efficiency and reduce burden of administrative processes
- Leverage technology to achieve efficient processes
- Provide the foundation to implement self-service in the future for employees and managers

# *Business Drivers*

- Expand technology for HR functions statewide as well as to support department-specific needs and objectives.
- Eliminate as much as practical silos of disparate data in multiple non-integrated systems into a system that will provide accurate and timely HR data and enhance our ability to more effectively manage our workforce.
- Support Secretariat Consolidation, one of the seven key initiatives of the IT Strategy for the Commonwealth FY 2009 to 2011 (published August 2008)
- Support Systems Modernization, one of the four supporting initiatives of the IT Strategy for the Commonwealth FY 2009 to 2011 (published August 2008)

# Executive Committee

---

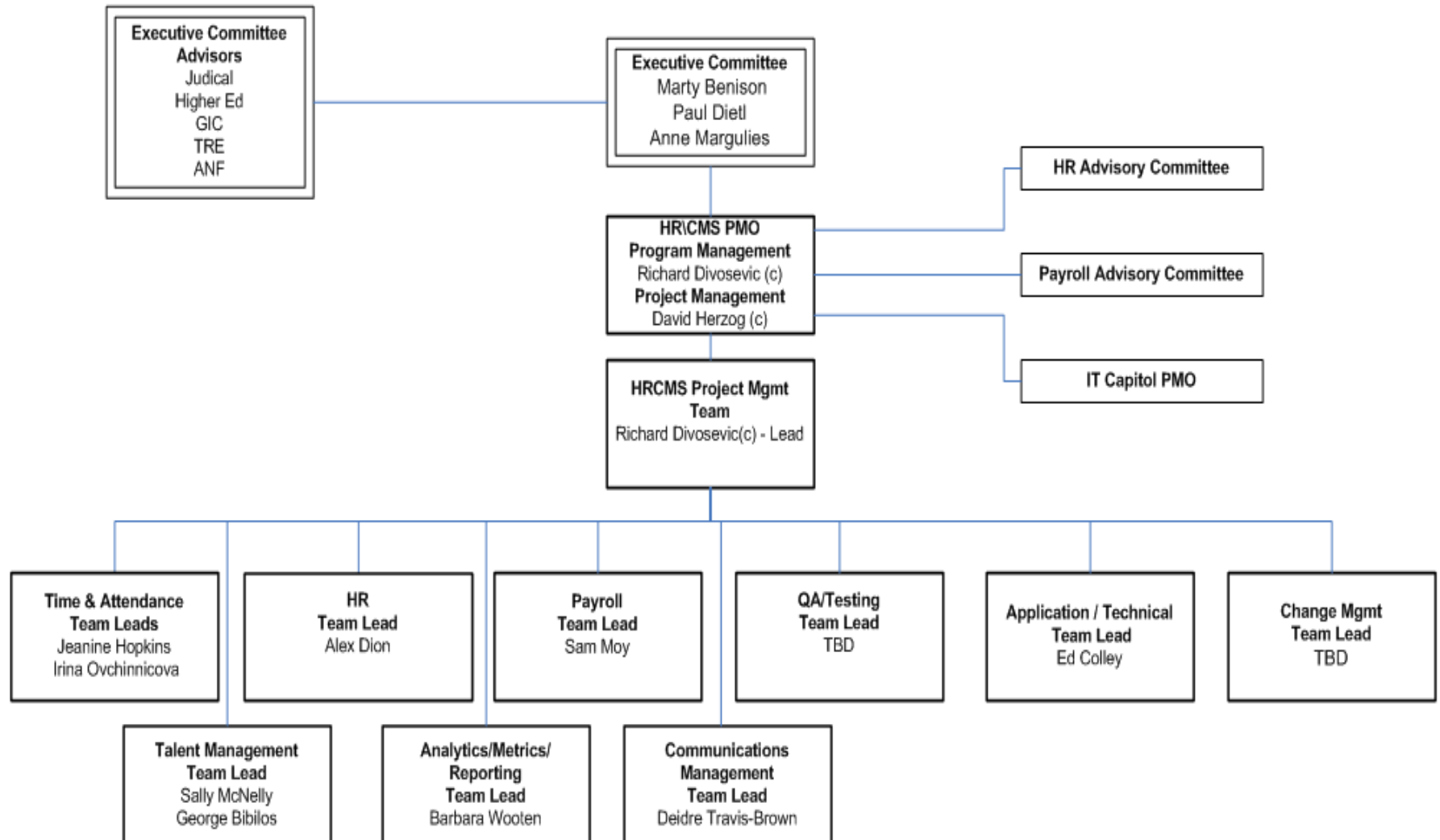
Martin Benison, Comptroller

Paul Dietl, Chief Human Resources Officer

Anne Margulies, Assistant Secretary and CIO

Program Manager - Richard Divosevic

# HR/CMS Program Organization Chart



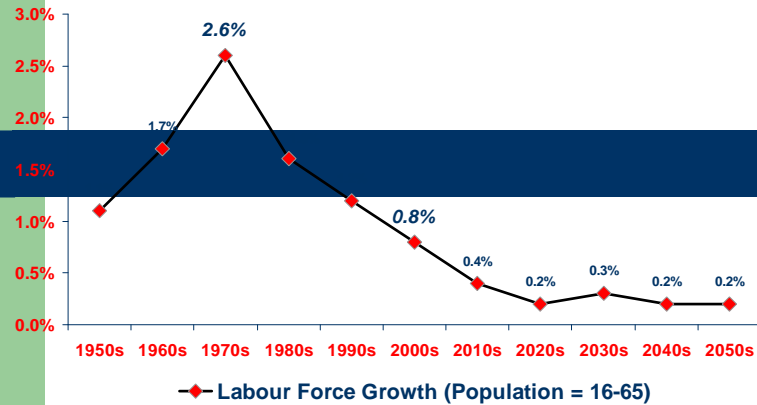


© 2014 Pearson Education, Inc. or its affiliate(s). All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or by any information storage or retrieval system, without permission in writing from Pearson Education, Inc.

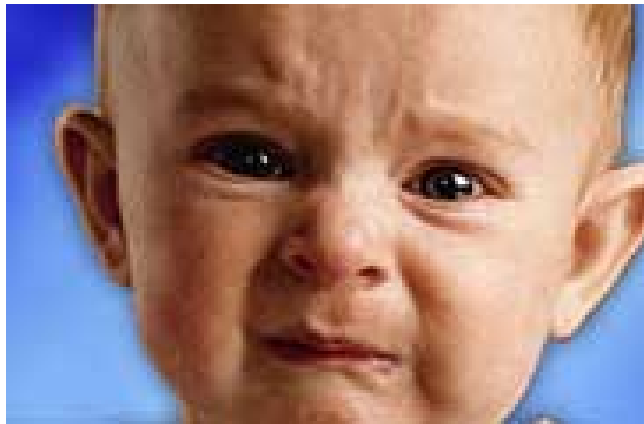
[illegible]

# Current HR Challenges

## Shrinking Workforce



## Multiple Generations



## Disengaged Employees



## Leadership Development

From Oracle:

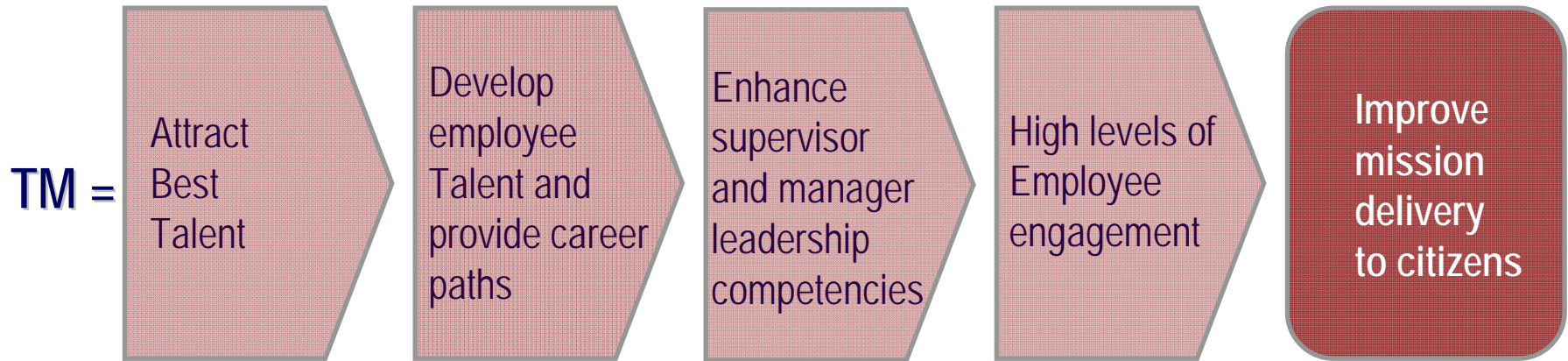
# What are the key questions?

- What customers are telling us...
  - “Help leaders manage the workforce to maximize effectiveness of the workforce to achieve mission delivery.”
  - “Transactional efficiency to reduce costs.”

Having the right talent in the right roles  
drives future success!



# Our Vision: Integrated TM System



Shared Services

Data key to measure HR impact

# LESS IS MORE

Less Customizations

=

Lower Upgrade Costs

WHY

More likely to upgrade when business case is made

# Key Functionality by Release

## What The Commonwealth Missed Along the Way

	8.3	8.8	8.9	9.0
<b>Core Changes</b>	<ul style="list-style-type: none"> <li>● FSA Claims Admin</li> <li>● Deferred Processing</li> <li>● Manage Professional Compliance</li> </ul>	<ul style="list-style-type: none"> <li>● Portal Navigation</li> <li>● Tools 8.4x</li> <li>● Commitment Accounting</li> </ul>	<ul style="list-style-type: none"> <li>● Person Model</li> <li>● Security Architecture</li> <li>● Labor Management</li> </ul>	<ul style="list-style-type: none"> <li>● Profile Mgmt</li> <li>● Approvals/ Delegation</li> <li>● Smart Hire</li> </ul>
<b>New Products</b>	<ul style="list-style-type: none"> <li>● HRMS Portal Pack</li> <li>● Directory Interface</li> <li>● Mass Update</li> </ul>	<ul style="list-style-type: none"> <li>● ePerformance</li> <li>● Enterprise Learning Management</li> <li>● HR HelpDesk</li> </ul>	<ul style="list-style-type: none"> <li>● Absence Management</li> </ul>	<ul style="list-style-type: none"> <li>● Workforce Scheduling</li> <li>● BI Publisher</li> </ul>
<b>Enhanced Products</b>	<ul style="list-style-type: none"> <li>● Collaborative Apps</li> <li>● Recruiting Solutions</li> <li>● Commitment Acctg</li> <li>● Workforce Analytics</li> <li>● Payroll</li> </ul>	<ul style="list-style-type: none"> <li>● Payroll</li> </ul>	<ul style="list-style-type: none"> <li>● ePerformance</li> <li>● Recruiting Solutions</li> <li>● Benefits</li> <li>● Time and Labor</li> <li>● Analytics</li> </ul>	<ul style="list-style-type: none"> <li>● Learning Mgmt</li> <li>● Analytics</li> </ul>

# PeopleSoft 9.0 Home Menu

Base Navigation Page - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/s/WEBLIB\_PTPP\_SC.HOMEPAGE.FieldFormula.IScript\_AppHP?pt\_fname=HC\_NORTH\_AMERICAN\_PA Certificate Error Live Search

File Edit View Favorites Tools Help

Base Navigation Page

ORACLE

Home Worklist Add to Favorites Sign out

**Menu**





Search:

- My Favorites
- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Stock
- Time and Labor
- Payroll for North America**
  - Employee Pay Data USA
  - Payroll Processing USA
  - Periodic Payroll Events USA
  - Periodic Payroll Events USF
- Workforce Development
- Organizational Development
- Enterprise Learning
- Set Up HRMS
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

**Main Menu >**

**Payroll for North America**

Maintain employee payroll information, process payrolls, collect taxes and process year-end requirements.

 <b>Employee Pay Data USA</b> Maintain employee payroll information. <ul style="list-style-type: none"><li><a href="#">Request Direct Deposit</a></li><li><a href="#">Tax Information</a></li><li><a href="#">Deductions</a></li></ul>	 <b>Payroll Processing USA</b> Manage paysheets, calculate and confirm payrolls, and create checks and advices. <ul style="list-style-type: none"><li><a href="#">Update Paysheets</a></li><li><a href="#">Produce Payroll</a></li></ul>	 <b>Periodic Payroll Events USA</b> Review, update, and process periodic payroll functions. <ul style="list-style-type: none"><li><a href="#">Mass Employee Updates</a></li></ul>
 <b>Periodic Payroll Events USF</b> Review, update, and process periodic payroll functions. <ul style="list-style-type: none"><li><a href="#">Mass Employee Updates</a></li></ul>		

Error on page.

Internet 100%

Start | Inbox - Microsoft Outlook | Fit Gap | ID and password for PS ... | FW: ID and password fo ... | Base Navigation Page... | 10:41 AM



# PeopleSoft 9.0 Additional Pay

Create Additional Pay - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/MAINTAIN\_PAYROLL\_DATA\_US.ADDITIONAL\_PAY.USA

Certificate Error

Live Search

File Edit View Favorites Tools Help

Create Additional Pay

ORACLE

Home Worklist MultiChannel Console Add to Favorites Sign out

Menu

Search:

My Favorites

Self Service

Manager Self Service

Recruiting

Workforce Administration

Benefits

Compensation

Stock

Time and Labor

Payroll for North America

Employee Pay Data CAN

Employee Pay Data USA

Tax Information

Deductions

Create Additional Pay

Request Direct Deposit

Update Payroll Options

Search by National ID

Employee Pay Data USF

Payroll Processing CAN

Payroll Processing USA

Payroll Processing USF

Retroactive Payroll

Payroll Distribution

Pay Period Tax Reports USA

Pay Period Tax Reports USF

Regulatory Reports CAN

Periodic Payroll Events CAN

Periodic Payroll Events USA

Create Additional Pay

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmplID: begins with

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Second Name: begins with

Alternate Character Name: begins with

Middle Name: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Done

Internet 100%

Start

Inbox - Microsoft Outlook

Presentations

Microsoft Excel - EC Mod...

Microsoft PowerPoint - [...]

Create Additional Pay...

3:07 PM



# PeopleSoft 9.0

## Create Additional Pay

Create Additional Pay - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/MAINTAIN\_PAYROLL\_DATA\_US.ADDITIONAL\_PAY.USA

File Edit View Favorites Tools Help

ORACLE

Home Worklist MultiChannel Console Add to Favorites Sign out

New Window Help Customize Page

Menu

Search:

- My Favorites
- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Stock
- Time and Labor
- Payroll for North America
  - Employee Pay Data CAN
  - Employee Pay Data USA
    - Tax Information
    - Deductions
    - Create Additional Pay
    - Request Direct Deposit
    - Update Payroll Options
    - Search by National ID
  - Employee Pay Data USF
  - Payroll Processing CAN
  - Payroll Processing USA
  - Payroll Processing USF
  - Retroactive Payroll
  - Payroll Distribution
  - Pay Period Tax Reports USA
  - Pay Period Tax Reports USF
  - Regulatory Reports CAN
  - Periodic Payroll Events CAN
  - Periodic Payroll Events USA

Additional Pay

Ed Test EMP ID: 0043 Empl Rcd #: 0

Additional Pay Find | View All First 1 of 1 Last

\*Earnings Code:

Effective Date Find | View All First 1 of 1 Last

Effective Date: 03/10/2009

Payment Details Find | View All First 1 of 1 Last

\*Addl Seq #: End Date:

Rate Code: Reason: Not Spec

Earnings: Hours: Hourly Rate:

Goal Amount: Goal Balance:

Sep Chk #: ☐ Disable Direct Deposit ☐ Prorate Additional Pay ☐ OK to Pay

Applies to Pay Periods: ☒ First ☒ Second ☒ Third ☐ Fourth ☐ Fifth

Job Information

Tax Information

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Correct History

Internet 100%

Start Inbox - Microsoft Outlook Presentations Microsoft Excel - EC Mod... Microsoft PowerPoint - [...] Create Additional Pay... 3:08 PM

# PeopleSoft 9.0

## Employee Report Elapsed Time

Timesheet - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/ROLE\_EMPLOYEE.TL\_MSS\_EE\_SRCH\_PRD.GBL?PORTALPARAM\_PTCNAV=HC\_TL\_SS\_JOB\_SRCH\_E

File Edit View Favorites Tools Help

Timesheet

ORACLE

Home Worklist MultiChannel Console Add to Favorites Sign out

Menu

Search:

My Favorites

Self Service

Time Reporting

Report Time

Timesheet

Mass Time

Overtime Requests

Web Clock

Absence Request

View Time

User Preferences

Personal Information

Payroll and Compensation

Benefits

Stock Activity

Learning and Development

Performance Management

Recruiting Activities

Class Search / Browse Catalog

Academic Planning

Enrollment

Campus Finances

Campus Personal Information

Academic Records

Degree Progress/Graduation

Transfer Credit

Admissions

Student Admission

Outreach

Timesheet

Betty Locherty

Employee ID: KU0007

Job Title: Director-Finance

Employee Record Number: 0

Click for Instructions

View By: Week Date: 03/09/2009 Refresh << Previous Week Next Week >>

Populate Time From: Schedule Information

Reported Hours: 0.00 Hours Scheduled Hours: 40.00 Hours

From Monday 03/09/2009 to Sunday 03/15/2009

Mon 3/9	Tue 3/10	Wed 3/11	Thu 3/12	Fri 3/13	Sat 3/14	Sun 3/15	Total	Time Reporting Code	Taskgroup
8.00	8.00	8.00	8.00	8.00					PSNONTASK

Save for Later Submit

Reported Time Status - click to hide

Date	Status	Total	Time Reporting Code	Comments
		0.000000		

Start

Inbox - Microsoft Outlook

Fit Gap

EC Mod Review Status a...

FitGap Participants v02 ...

Timesheet - Microsof...

Internet

100%

3:35 PM

# PeopleSoft 9.0 Payroll Self-Service Menu

Base Navigation Page - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/s/WEBLIB\_PTPP\_SC.HOMEPAGE.FieldFormula.IScript\_AppHP?pt\_fname=HC\_PAYROLL\_COMP&Folde Certificate Error Live Search

File Edit View Favorites Tools Help

Base Navigation Page

ORACLE

Home Worklist Add to Favorites Sign out

Menu

Search:

- My Favorites
- Self Service
  - Time Reporting
  - Personal Information
  - Payroll and Compensation**
    - View Paycheck
    - View Payslips
    - View Payslip GBR
    - 3rd Party Pay Inquiry
    - Voluntary Deductions
    - Direct Deposit
    - Personal Bank Accounts
    - Compensation History
    - Agreement Personalization
    - Profit-Sharing Entitlements
    - Pay Distribution Instructions
    - View T4/T4A Slips
    - T4/T4A Consent
    - W-4 Tax Information
    - W-4 Tax Information USA
    - View W-2/W-2c Forms
    - W-2/W-2c Consent
    - W-2 Reissue Request
    - W-2 Reissue Request USA
    - Year End Adjustment Info JPN
  - Benefits
  - Stock Activity
  - Learning and

Main Menu > Self Service >

## Payroll and Compensation

Review your pay and compensation history. Update your direct deposit and other deduction or contribution information.

<b>View Paycheck</b> Review current and prior paychecks.	<b>View Payslips</b> Review current and prior payslip details.	<b>View Payslip GBR</b> Review payslips of United Kingdom payees.
<b>3rd Party Pay Inquiry</b> Review paychecks from a third party payroll system.	<b>Voluntary Deductions</b> Add or update your voluntary deductions.	<b>Direct Deposit</b> Add or update your direct deposit information.
<b>Personal Bank Accounts</b> Add or update Payee Bank Account information.	<b>Compensation History</b> Review compensation history for base, variable, and stock options.	<b>Agreement Personalization</b> Review your Agreement and personalize investment and/or interest options.
<b>Profit-Sharing Entitlements</b> Review profit-sharing amounts, deductions, interests and enter fund requests.	<b>Pay Distribution Instructions</b> Add or update Net Pay Distribution Elections.	<b>View T4/T4A Slips</b> View electronic T4 and T4A slips.
<b>T4/T4A Consent</b> Grant or withdraw consent to receive electronic T4 and T4A slips.	<b>W-4 Tax Information</b> Review or change your W-4 information.	<b>W-4 Tax Information USA</b> Review or change your W-4 information.
<b>View W-2/W-2c Forms</b> View electronic W-2 and W-2c forms.	<b>W-2/W-2c Consent</b> Grant or withdraw consent to receive electronic W-2 and W-2c forms.	<b>W-2 Reissue Request</b> Request a reissued W-2.
<b>W-2 Reissue Request USA</b> Request W-2 to be reissued	<b>Year End Adjustment Info JPN</b> Enter your year-end adjustment information.	

Error on page.

Start | Internet | 100%

Inbox - Microsoft Outlook | Fit Gap | ID and password for PS ... | FW: ID and password fo... | Base Navigation Page...

10:43 AM

# PeopleSoft 9.0

## Paycheck Self-Service Search Page

View Paycheck - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/ROLE\_EMPLOYEE.PY\_IC\_PAY\_INQ.GBL?NAVSTACK=Clear&FolderPath=PORTAL\_ROOT\_OBJECT.C

File Edit View Favorites Tools Help

View Paycheck

ORACLE

Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page |

### View Paycheck

Menendez, Jorge

Review your available paychecks below. Select the check date of the paycheck you would like to review.

Check Date	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
<a href="#">2005-04-29</a>	Global Business Institute 9999	04/01/2005	04/30/2005	\$3931.97	3861	
<a href="#">2005-03-31</a>	Global Business Institute 9999	03/01/2005	03/31/2005	\$3931.97	3820	
<a href="#">2005-02-28</a>	Global Business Institute 9999	02/01/2005	02/28/2005	\$3931.97	3404	
<a href="#">2005-01-31</a>	Global Business Institute 9999	01/01/2005	01/31/2005	\$3931.97	2732	

Start | Internet | 100% | 10:45 AM

# PeopleSoft 9.0

## Paycheck Self-Service View (1)

View Paycheck - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/ROLE\_EMPLOYEE.PY\_IC\_PAY\_INQ.GBL?NAVSTACK=Clear&FolderPath=PORTAL\_ROOT\_OBJECT.C

File Edit View Favorites Tools Help

View Paycheck

ORACLE

Home Worklist Add to Favorites Sign out

**Menu**

Search:

- My Favorites
- Self Service
  - Time Reporting
  - Personal Information
  - Payroll and Compensation
    - View Paycheck**
    - View Payslips
    - View Payslip GBR
    - 3rd Party Pay Inquiry
    - Voluntary Deductions
    - Direct Deposit
    - Personal Bank Accounts
    - Compensation History
    - Agreement
    - Personalization
    - Profit-Sharing
    - Entitlements
    - Pay Distribution
    - Instructions
    - View T4/T4A Slips
    - T4/T4A Consent
    - W-4 Tax Information
    - W-4 Tax Information USA
    - View W-2/W-2c Forms
    - W-2/W-2c Consent
    - W-2 Reissue Request
    - W-2 Reissue Request USA
    - Year End Adjustment Info JPN
  - Benefits
  - Stock Activity
  - Learning and

### View Paycheck

Jorge Menendez

**Company:**  
Global Business Institute 9999

**Address:**  
500 George Washington Pkwy  
New York, NY 07666

**Net Pay:** \$3,931.97

**Pay Begin Date:** 04/01/2005

**Pay End Date:** 04/30/2005

**Check Date:** 04/29/2005

Review the details of your paycheck. To view other checks, select [View a Different Paycheck](#)

#### General

<b>Name:</b>	Jorge Menendez	<b>Business Unit:</b>	GBIBU
<b>Employee ID:</b>	KUD007	<b>Pay Group:</b>	US Monthly
<b>Address:</b>	1190 Noe St San Francisco, CA 94114	<b>Department:</b>	10000 - Human Resources
		<b>Location:</b>	California Location
		<b>Job Title:</b>	Manager-HR Help Desk
		<b>Pay Rate:</b>	\$6,000.00 Monthly

#### Tax Data

<b>Fed Marital Status:</b>	Single	<b>CA Marital Status:</b>	Single, or Married with two or more inco
<b>Fed Allowances:</b>	0	<b>CA Allowances:</b>	0
<b>Fed Addl Percent:</b>	0.000	<b>CA Addl Percent:</b>	0.000
<b>Fed Addl Amount:</b>	\$0.00	<b>CA Addl Amount:</b>	\$0.00

Start | Internet | 100% | 10:45 AM



# PeopleSoft 9.0

## Paycheck Self-Service View (2)

View Paycheck - Microsoft Internet Explorer provided by Information Technology Division

https://170.63.175.38/psp/HR905BX/EMPLOYEE/HRMS/c/ROLE\_EMPLOYEE.PY\_IC\_PAY\_INQ.GBL?NAVSTACK=Clear&FolderPath=PORTAL\_ROOT\_OBJECT.C

File Edit View Favorites Tools Help

View Paycheck

ORACLE

Home Worklist Add to Favorites Sign out

**Menu**

Search:

- My Favorites
- Self Service
  - Time Reporting
  - Personal Information
  - Payroll and Compensation
    - View Paycheck**
      - View Payslips
      - View Payslip GBR
      - 3rd Party Pay Inquiry
      - Voluntary Deductions
      - Direct Deposit
      - Personal Bank Accounts
      - Compensation History
      - Agreement
      - Personalization
      - Profit-Sharing
      - Entitlements
      - Pay Distribution
      - Instructions
      - View T4/T4A Slips
      - T4/T4A Consent
      - W-4 Tax Information
      - W-4 Tax Information USA
      - View W-2/W-2c Forms
      - W-2/W-2c Consent
      - W-2 Reissue Request
      - W-2 Reissue Request USA
      - Year End Adjustment Info JPN
    - Benefits
    - Stock Activity
    - Learning and

**Paycheck Summary**

Period	Gross Earnings	Fed Taxable Gross	Total Taxes	Total Deductions	Net Pay
Current	6,000.00	6,000.00	2,068.03	0.00	3,931.97
YTD	24,000.00	24,000.00	8,272.12	0.00	15,727.88

**Earnings**

Description	Hours	Rate	Amount	YTD Amount
Regular			6,000.00	23,446.16
Holiday				553.84
<b>Total:</b>			6,000.00	24,000.00

**Taxes**

Description	Amount	YTD Amount
Fed Withholding	1,180.21	4,720.84
Fed MED/EE	87.00	348.00
Fed OASDI/EE	372.00	1,488.00
CA Vol Dis/EE	60.00	240.00
CA Withholding	368.82	1,475.28
<b>Total:</b>	2,068.03	8,272.12

**Before-Tax Deductions**

Description	Amount	YTD Amount
<b>Total:</b>	0.00	0.00

**After Tax Deductions**

Description	Amount	YTD Amount
<b>Total:</b>	0.00	0.00

**Employer Paid Benefits**

Description	Amount	YTD Amount
* Taxable		
<b>Total:</b>	0.00	0.00

**Net Pay Distribution**

Payment Type	Paycheck Number	Account Type	Account Number	Amount
Check	3861	Issue Check		3,931.97

Internet 100%

Start | Inbox - Microsoft Outlook | Fit Gap | ID and password for PS ... | FW: ID and password fo ... | View Paycheck - Micr...

10:46 AM

# Department Assistance

- Every department has a liaison for Upgrade Communication
- A cross selection of HR /Payroll and Time & Labor users volunteered to participate in Fit Gap Sessions
- Future PUG's, Workshops and Change Management materials will help update progress

# Fit - Gap

Fit-Gap Session Schedule			
	Date	Time	Confirmed Departments
<b>Human Resources</b>	March 18, 2009 (Wednesday)	9:00am to Noon	EHS, SDW, SSA, WES, DOC DCR, DOR, EOL, CME, DOL, RGT, AGO, TRC, FSC, TRP
	March 19, 2009 (Thursday)	9:00am to Noon	
	March 23, 2009 (Monday)	1:00pm to 4:00pm	
	March 24, 2009 (Tuesday)	9:00am to Noon	
	March 24, 2009 (Tuesday)	1:00pm to 4:00pm	
<b>Time and Labor</b>	March 25, 2009 (Wednesday)	9:00am to Noon	DCR, POL, BSB, DCP, LOT, MAC, RMV, SDW, DAC, EHS, AGO, EOL, RGT, TRC, HCC, DOC, SAO, EQE
	March 26, 2009 (Thursday)	9:00am to Noon	
	March 26, 2009 (Thursday)	1:00pm to 4:00pm	
<b>Payroll</b>	April 01, 2009 (Wednesday)	9:00am to Noon	SSA, AGO, TRC, DCR, TRE, RGT, POL, MAC, RMV, SDW, EHS, ETH, GCC, DOC, SAO, EOL
	April 02, 2009 (Thursday)	9:00am to Noon	
	April 02, 2009 (Thursday)	1:00pm to 4:00pm	



# What's Next

- Fit-Gap (In Process)
- Deliver Fit-Gap Summary Report
- Begin Construct Phase
  - Upgrade HR/CMS 8.0 to new 9.0 version
- Time & Labor Requirements for Pilot Project

# Questions



A thick green horizontal bar is positioned at the top left of the slide, extending from the left edge and partially overlapping the white background.

# SmartPlan

Rob Young

# SMART Plan Agenda

---

Presented by Rob Young, Account Manager

- Deferral Recordkeeping
  - Information Guide
  - Deferral File Report
- OBRA
  - Information Guide
  - Required Enrollment Forms
- Questions

# Deferral Recordkeeping Guide

Massachusetts Deferred Compensation SMART Plan  
Office of State Treasurer Timothy P. Cahill

**TRANSITION**

## A Guide to Deferral Recordkeeping

SAVE MONEY AND RETIRE TOMORROW

Deferral recordkeeping allows participants in the Massachusetts Deferred Compensation SMART Plan (SMART Plan) to make deferral changes through the automated voice response system, the Web site, or a local representative. With deferral recordkeeping, paper forms are not needed. Participant deferral changes are submitted on a monthly file to the department's designated primary contact for updating in HR/CMS via Great-West Retirement Services® (Great-West) Plan Service Center (PSC).

Understanding how to access and utilize the deferral file is important as it provides a quick and easy method for payroll administrators' to collect deferral change information for participants in the SMART Plan.

This guide provides responses to payroll administrators' most frequently asked questions about how to access and utilize the deferral file.

**Q: How will I be notified that a participant has made a change to his/her deferral amount?**



**A:** Great-West will send participant deferral changes to the department's designated primary contact. Beginning on the first business day of each month, primary contacts will need to log in to the PSC to retrieve the deferral file for the prior month. Primary contacts will receive an auto-generated e-mail notifying them that the deferral file is available. The e-mail will also include instructions on how to access the deferral file through the PSC.

**Q: How do I log in to the PSC?**

**A:** 1. Go to [www.mass-smart.com](http://www.mass-smart.com) > Plan Sponsor.  
2. Enter your Username and password.  
• If you do not have or cannot remember your Username and password, please call the Plan Sponsor Line at (800) 695-4952 to speak with a Plan Service Center Representative.  
3. Select from the drop-down menu or enter the Plan number you wish to access.

Plan Number:	Plan Name:
98966-01	Massachusetts Deferred Compensation SMART Plan
98966-02	Massachusetts Deferred Compensation SMART Plan – Mandatory OBRA
98966-03	Massachusetts Deferred Compensation SMART Plan – Voluntary OBRA

Please note, you will have inquiry or view access only in the PSC.



- Now available via your local rep or by calling (877) 457-1900, option 2.
- Provides payroll administrators with information about the deferral recordkeeping process and deferral file.

# OBRA Information Guide

- Available at [www.mass-smart.com](http://www.mass-smart.com) > Participate > OBRA or via your local representative.
- Provides employees with basic facts about OBRA and the SMART Plan.
  - Mandatory Contributions
  - Investment Option
  - Administrative Fees
  - Distributions

Massachusetts Deferred Compensation SMART Plan – Mandatory OBRA

Office of State Treasurer Timothy P. Cahill

PARTICIPATE

OBRA Information Guide

SAVE MONEY AND RETIRE TOMORROW

**Basic Facts About OBRA and the Massachusetts Deferred Compensation SMART Plan**

As a part-time, seasonal or temporary employee of the Commonwealth of Massachusetts or a Massachusetts local government employer, you are required to participate in the Massachusetts Deferred Compensation SMART Plan (SMART Plan). The SMART Plan is an alternative to Social Security as permitted by the federal Omnibus Budget Reconciliation Act of 1990 (OBRA). OBRA, passed by the U.S. Congress, requires that beginning July 1, 1991, employees not eligible to participate in their employer's retirement program be placed in Social Security or another program meeting federal requirements. The SMART Plan meets these federal requirements.

**Mandatory Contributions**

As an OBRA employee, you must contribute at least 7.5% of your gross compensation per pay period to the SMART Plan. This contribution is deducted on a pre-tax basis, reducing your current taxable income. This means that you will not pay any tax on this money until it is distributed from your account.

Your human resources or payroll center representative will provide you with an OBRA Mandatory Participation Agreement. Please complete and return the form to either your human resources or payroll center representative.

**Investment Option**

All mandatory contributions to the SMART Plan will be invested in the Income Fund. The Income Fund is designed to protect your principal and maximize earnings. Your account will earn interest based upon the prevailing rates for this type of investment. Mandatory contributions may not be transferred out of the Income Fund.

Additional information regarding the Income Fund may be obtained online at [www.mass-smart.com](http://www.mass-smart.com) > Invest > Fund Fact Sheets or via the SMART Plan Service Center at (877) 457-1900.<sup>1</sup>

**Administrative Fee**

There is a fee of \$18.48 per OBRA account, per annum, charged monthly. Fees are used to pay for administrative, recordkeeping, communication and investment education expenses.

**Voluntary Contributions**

You may make additional contributions (voluntary contributions) above the mandatory contribution of 7.5% of compensation per pay period. Any voluntary contributions that you elect to make may be invested among the SMART Plan's wide array of investment options and are freely transferable among options in accordance with the terms of the SMART Plan. OBRA voluntary contributions will not be charged an additional administrative fee.

To set up voluntary contributions or to learn more, please contact your local SMART Plan Representative at (877) 457-1900, option 2.<sup>2</sup>

**Account Management**

Once you are enrolled in the SMART Plan, you will have access to your account 24 hours a day, seven days a week through the Web site at [www.mass-smart.com](http://www.mass-smart.com) > Account Access or via the SMART Plan Service Center at (877) 457-1900.<sup>1</sup> All you need is your Social Security number (SSN) and Personal Identification Number (PIN). Your PIN will be mailed to your home as soon as you are enrolled in the SMART Plan.<sup>1</sup> Upon initial login to the Web site, please enter your SSN in the Username field. For security purposes, you will then be asked to create a personalized Username.

Through either the Web site or SMART Plan Service Center, you can:

- Obtain your account balance(s), allocations and transaction history
- Obtain investment option information and returns
- Order a new PIN or personalize your PIN
- Update your beneficiary information as needed

**Statements**

You will receive an annual statement in January of each year showing contributions, earnings, fees, distributions and the total value of your account. Please review your statement carefully to ensure your information is correct. It is extremely important that you keep the Plan administrator advised of your current address.

To update your address, call the SMART Plan Service Center at (877) 457-1900. You can also go to [www.mass-smart.com](http://www.mass-smart.com) > Find a Form. Click on the link OBRA Mandatory Personal Information Change Request. Mail or fax the completed form to the address or fax number provided on the form.

**Distributions**

Distribution of your SMART Plan benefits can only be made upon:

- Severance from employment
- Your death

Severance from employment occurs because of your voluntary or involuntary termination of employment. There is no early withdrawal penalty for taking a distribution of your account upon separation of service, regardless of your age. If you



# OBRA Reminder

---



- All temporary, seasonal or part-time employees classified as OBRA are required to complete a Participant Enrollment form
- The enrollment form provides Great-West with
  - Participant Address
  - Participant Date of Birth
  - Beneficiary Names

# Enrollment Form

- All forms are available at [www.mass-smart.com](http://www.mass-smart.com) > Find A Form.
- Forms may be returned by mail or fax as indicated on each form.

**Participant Enrollment**  
**Governmental 457(b) Plan**

**Massachusetts Deferred Compensation SMART Plan - Mandatory OBRA** 98966-02

**Participant Information**

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_  
Address - Number & Street \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
( ) Home Phone ( ) Work Phone  
Social Security Number \_\_\_\_\_  
E-Mail Address \_\_\_\_\_  
☐ Married ☐ Unmarried ☐ Female ☐ Male  
Mo Day Year Mo Day Year  
Date of Birth Date of Hire

**Payroll Information**

To be completed by  
Representative: \_\_\_\_\_  
Division Name \_\_\_\_\_ Division Number \_\_\_\_\_

**Investment Option Information (applies to all contributions)** - Please refer to your marketing communication materials for information regarding each investment option.  
I understand that funds may impose redemption fees on certain transfers, redemptions or exchanges if assets are held less than the period stated in the fund's prospectus or other disclosure documents. I will refer to the fund's prospectus and/or disclosure documents for more information.

**INVESTMENT OPTION NAME** **INVESTMENT OPTION CODE**  
The Income Fund \_\_\_\_\_ MELINC \_\_\_\_\_ 100%  
MUST INDICATE WHOLE PERCENTAGES = 100%

**Plan Beneficiary Designation**

This designation is effective upon execution and delivery to Service Provider at the address below. I have the right to change the beneficiary. If any information is missing, additional information may be required prior to recording my beneficiary designation. If my primary and contingent beneficiaries predecease me or I fail to designate beneficiaries, amounts will be paid pursuant to the terms of the Plan Document or applicable state law.  
You may only designate one primary and one contingent beneficiary on this form. However, the number of primary or contingent beneficiaries you name is not limited. If you wish to designate more than one primary and/or contingent beneficiary, do not complete the section below. Instead, complete and forward the Beneficiary Designation form.

**Primary Beneficiary**  
100.00%  
% of Account Balance Social Security Number Primary Beneficiary Name Relationship Date of Birth

**Contingent Beneficiary**  
100.00%  
% of Account Balance Social Security Number Contingent Beneficiary Name Relationship Date of Birth

**Participation Agreement**

**Withdrawal Restrictions** - I understand that the Internal Revenue Code (the "Code") and/or my employer's Plan Document may impose restrictions on transfers and/or distributions. I understand that I must contact the Plan Administrator/Trustee to determine when and/or under what circumstances I am eligible to receive distributions or make transfers.

**Compliance With Plan Document and/or the Code** - Participation in this Plan is mandatory. A deduction will be taken from your wages and invested on your behalf based on your employer's Plan Document. I agree that my employer or Plan Administrator/Trustee may take any action that may be necessary to ensure that my participation in the Plan is in compliance with any applicable requirement of the Plan Document and/or the Code. I understand that the maximum annual limit on contributions is determined under the Plan Document and/or the Code. I understand that it is my responsibility to monitor my total annual contributions to ensure that I do not exceed the amount permitted. If I exceed the contribution limit, I assume sole liability for any tax, penalty, or costs that may be incurred.

**Incomplete Forms** - I understand that in the event my Participant Enrollment form is incomplete or is not received by Service Provider at the address below prior to the receipt of any deposits, I specifically consent to Service Provider retaining all monies received and allocating them to the default investment option.

**Account Corrections** - I understand that it is my obligation to review all confirmations and quarterly statements for discrepancies or errors. Corrections will be made only for errors which I communicate within 90 calendar days of the last calendar quarter. After this 90 days, account information shall be deemed accurate and acceptable to me. If I notify Service Provider of an error after this 90 days, the correction will only be processed from the date of notification forward and not on a retroactive basis.

Form 1 GWRS FENRAP 3121 01/31/08 Page 1 of 2  
TAYC15104429  
Great-West Retirement Services® refers to the products and services of  
Great-West Life & Annuity Insurance Company and FASCore, LLC.

**ADMIN FORMAT**  
D02:120507



# Questions?

---

Thank you

# SmartPlan Payroll Administrator Changes

Contact Silas Shah at CTR for any changes to the department payroll contact.

# Deductions by Percentage

- *Reminder of Feature offered by Smart Plan*
- *In General Deductions, choose **Percent of Federal Gross**. Make the choice from the deduction Calculation Routine drop down menu.*
- Will apply to all job records.
- Do not choose any of the other options

[Home](#)[Worklist](#)[Help](#)[Home](#) > [Compensate Employees](#) > [Maintain Payroll Data \(US\)](#) > [Use](#) > **General Deduction Data**[New Window](#)**General Deduction Data**

Vasu, Retirement

EmplID: PML1104

Empl Rcd Nbr: 0

Company: COM Commonwealth of Massachusetts


**General Deduction**[Find](#) | [View All](#)

|&lt; ◀ 1 of 1 ▶ &gt;|

'Deduction Code: DCOMPL  Deferred Comp - Last 3 years E**Deduction Details**[Find](#) | [View All](#)

|&lt; ◀ 1 of 1 ▶ &gt;|

'Effective Date:

03/07/2008 

Take on all Paygroups



'Deduction Calculation Routine:

Percent of Federal Gross



Deduction End Date:

Deduction Rate or %:

Loan Interest %:

Flat/Addl Amount:

Goal Amount:

Current Goal Balance:

Ded. stopped by Self Serv User

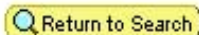


This data was last updated by Online Opr Data last updated on

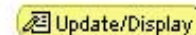
03/07/2008



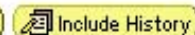
Save



Return to Search



Update/Display



Include History



Correct History

A thick green horizontal bar is positioned at the top left of the slide, extending across the top edge.

# **2009 Payroll Reminders**

Kevin McHugh

# W4 - Exempt Employees

- Final Notices for Exempt W4 Employees are going out to CFO's.
- Review [HTAX103 - W-4 Exempt Report](#).
- Remember to remove your employees from the report insert a new row with an Effective Date in 2009

# Qualified Parking

- Monthly Exclusion Amount for Parking is \$230
- Processed one month in arrears (January's benefit is processed in February)
- Use the CIW and reconcile your employees balances.
- PKF and PRF calculate both federal and state withholding amounts.
- The use of *state* earnings codes PKS and PRS is prohibited.

# Retirement 2000

Massachusetts Department of Revenue allows employees to receive the first \$2000 in combined Retirement Deductions and Medicare Tax to be excluded from MA Taxable Gross Wages. So from the start of the new calendar year (Jan) up until this \$2000 threshold is met employees will have less MA Taxable Gross to deduct taxes from, thus less MA taxes taken. Employees will see a gradual increase in their MA tax withholding (sometimes up to 2 payperiods) as they go over the \$2000 threshold.



# New Hires

## NEW HIRES — Reminder:

- The United States Customs and Immigration Services has issued a new *Form I9, Employment Eligibility Verification* to be used during the New Hire process. Employing departments should note the changes to List A for acceptable identity and work authorization papers. See <http://www.uscis.gov/portal/site/uscis>
- **Report any SSN problems to the helpdesk immediately**
- **DO NOT, DO NOT, DO NOT bypass HRCMS edits using an invalid SSN**

**WARNING:**



**DO NOT use invalid  
SSNs**

# Payroll Close / Open Timeline

Kevin McHugh, CTR

# Key Dates

- Prior to June 1: Identify any FY09 COA changes, e.g. program codes or appropriation changes
- May 1<sup>st</sup>- Start entering PH documents
- June 1<sup>st</sup> – Position Rules Roll Departments can begin requesting FY09 Rules
- June 1<sup>st</sup> - PH over \$25K requires ANF approval for Executive Branch Departments

# Key Dates

- June 19- Last day for HR transactions or Garnishment transactions in HRCMS for PPE June 20
- June 22- Last Day for posting Time for PPE June 20
- June 23- Last day for making changes in Labor distribution in LCM for PPE June 20

# Key Dates- Split Year

- June 30- Last day for entering PH  
Last Day for PRRV (Cash Cut off of 7/1) for FY09
- July 3 – Last Day for HR transactions
- July 6 – Last Day for Time and Attendance Entry in HRCMS
- July 7 – Last Day for LCM changes

# Mass Rules Roll - MPOAA

- On June 1<sup>st</sup>, CTR will either approve or reject all pending POAA Rules requested for FY09 Activity and will Process the MPOAA program. Any new rules needed for FY09 Activity can be entered after June 2<sup>nd</sup>.
- New draft rules for FY10 will be in the LCM document catalog

# Split Year Proration

- Payroll will be based on 7 business days in FY09 and 3 days in FY10
- All Prior Pay Period postings will post to FY09
- Job Actions will create a time slice which will affect the proration



# Split Year Considerations

---

- All Sick and Vacation buy outs will post to FY09 if processed during Split year
- Details will be included in the Open / Close Instructions

# Accounts Payable

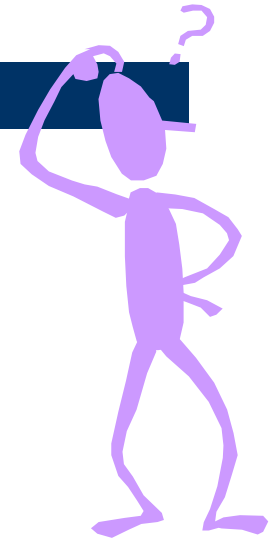
- Payroll Holds are object code based so departments need to encumber based on estimated payroll dollars i.e. A01,A08,B02, etc.
- All PH documents will workflow to CTR Payroll in order to assist departments in proper PH documents set-up.
- ◆ The PH document must include a justification in the Comment.

# HR Reminder:

---

- Be careful when rehiring employees whose HRCMS history (Obj Code, Account, Unit) shows Accounting information no longer valid in the new FY.
- It must be corrected as of July 1 in the new FY.

**Questions?**



# PayInfo

A decorative green bar is located at the top left of the slide. A dark blue horizontal bar with rounded ends spans across the slide, positioned below the 'PayInfo' header.

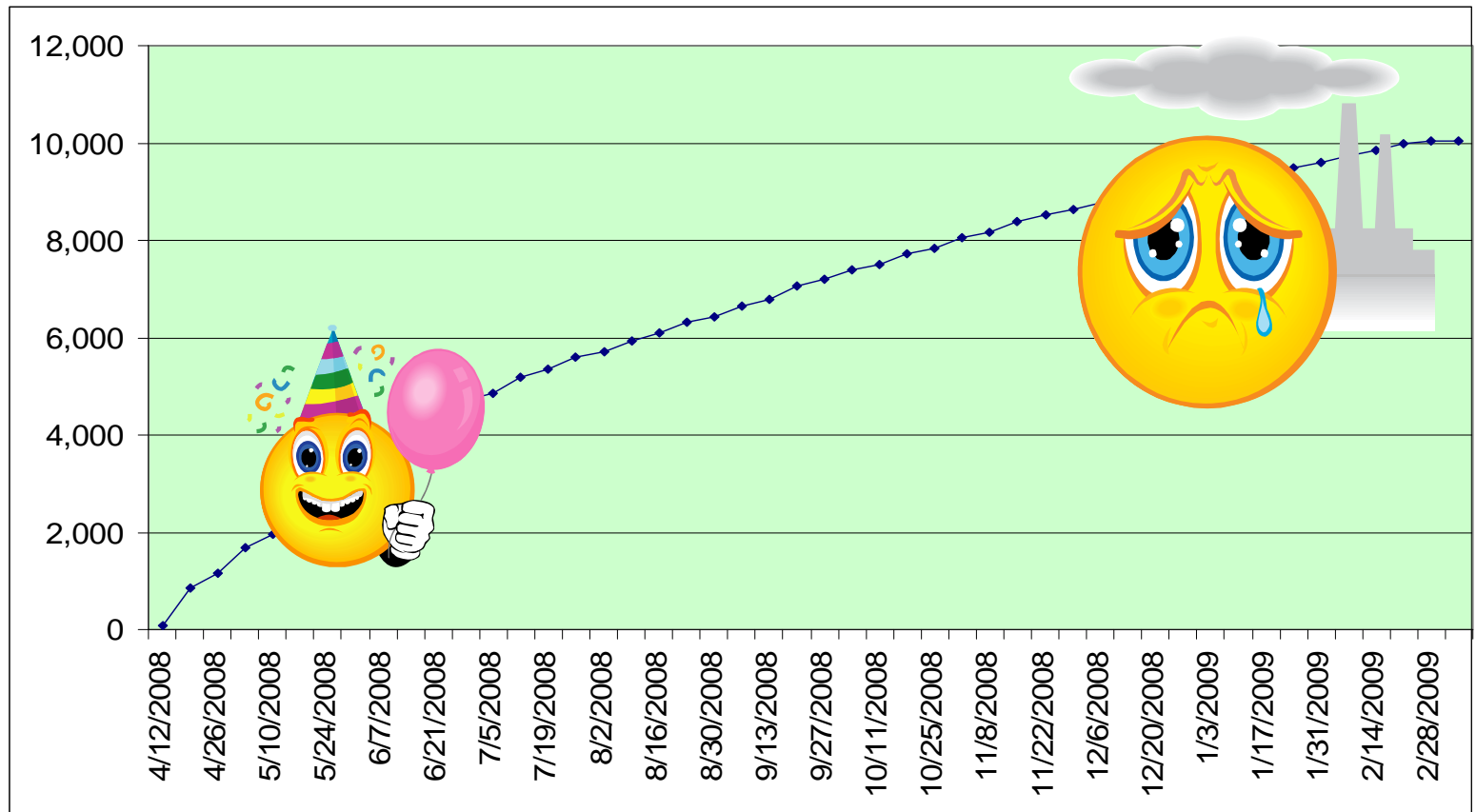
Kevin McHugh

# PayInfo

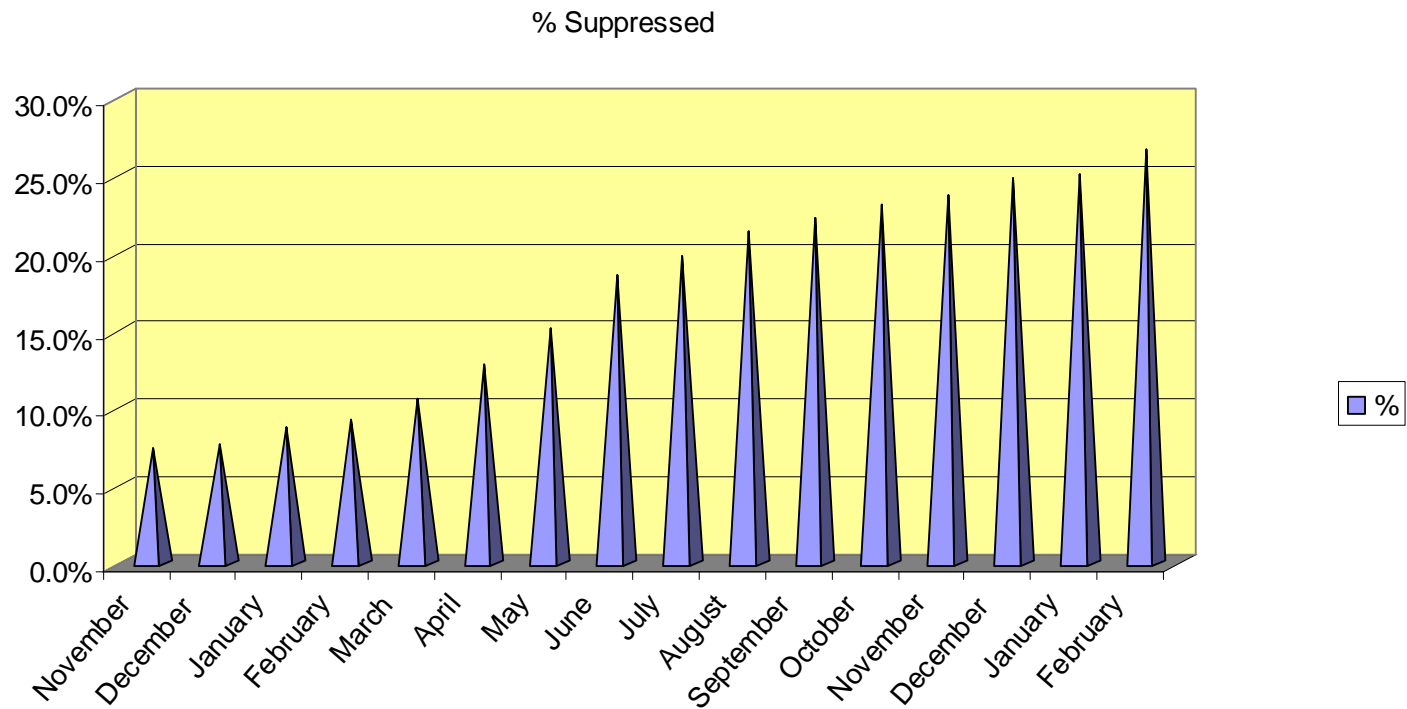
Kevin McHugh, CTR



# Employees Who Have Gone Green Through PayInfo



# Including All Suppression (online and batch)



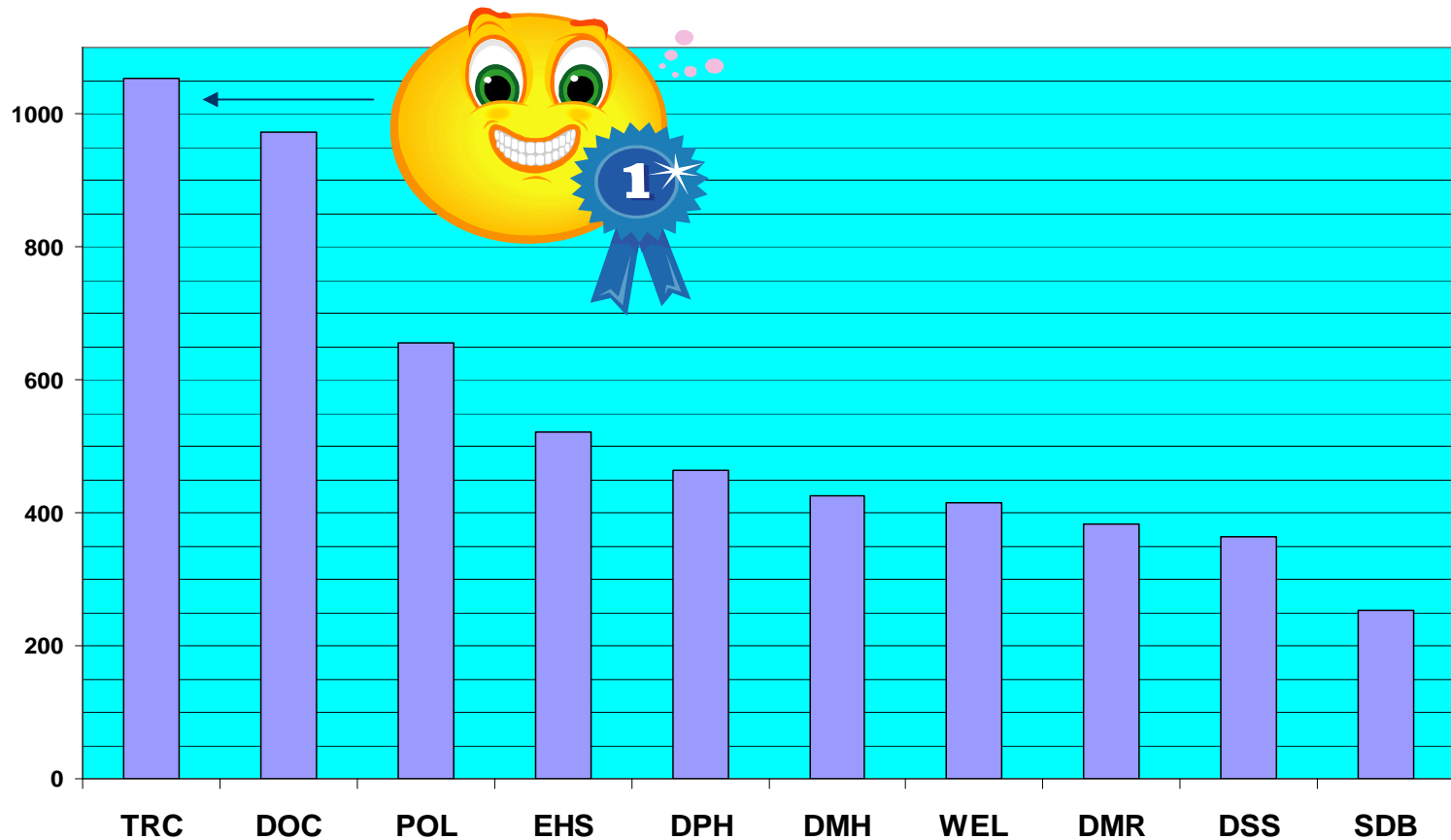


# The rate of suppression has started to level

- Need your ideas to reach 100% goal
- Only you can do this



# Top Ten Departments



# Questions?

